



Format Guide

FBLA-PBL FORMAT GUIDE

Today's successful businesses require a consistent message throughout the organization. A foundation of this strategy is the use of a format guide so that a corporation maintains a uniform image through all its communications. As the premier student business organization, it is our responsibility to guide our students according to today's business practices. With this in mind, we have crafted a Format Guide by which our students and advisers can prepare for the Computer Applications and Word Processing skill events. Please review the Format Guide carefully in preparing for these events.

General Guidelines

| | |
|-------------------|--|
| Font Size: | 12 |
| Font Style: | Times, Times New Roman, or Arial |
| Spacing: | 1 or 2 spaces after punctuation ending a sentence (stay consistent within the document) 1 space after a semicolon 1 space after a comma 1 or 2 spaces after a colon (stay consistent within the document) 1 space between state abbreviation and ZIP |
| Letters: | Block Style with Open Punctuation Top Margin: 2 inches Side and Bottom Margins: 1 inch |
| Memorandums: | Standard Style Top Margin: 2 inches Side and Bottom Margins: 1 inch |
| Unbound Report: | Body double spaced Top Margin: 2 inches first page, 1 inch remaining pages Side and Bottom Margins: 1 inch Page number is placed 0.5 inches at right margin starting on page 2 |
| Leftbound Report: | Body double spaced Top Margin: 2 inches first page, 1 inch remaining pages Side Margins: Left 1½ inches – Right 1 inch Bottom Margin: 1 inch Page number is placed 0.5 inches at right margin starting on page 2 |

Miscellaneous Documents: Top Margin: 2 inches (Agenda, Itinerary, Minutes, News Release, Outline, Table of Contents)
Side and Bottom Margins: 1 inch

Miscellaneous Notes: Left justification of documents is to be used unless otherwise indicated.
Main and subheadings should be keyed in boldface.

Note: Documents in this style manual may not show the correct top margins because of the instruction box at the top of the page.

ADVANCED LETTER FEATURES

Mailing Notation: A mailing notation is keyed a double space below the date in ALL CAPS followed by a double space before the inside address.

Attention Line: An attention line is keyed as the first line of the inside address. When an attention line is used, the salutation is "Ladies and Gentlemen."

Subject Line: A subject line should be keyed a double space below the salutation in ALL CAPS. The subject line begins at the left margin. The word "subject" or "re" are not used when keying the subject line.

Second Page Heading: If a letter contains more than one page, key a heading at the top of each subsequent page. Key the first line of the inside address, page number, and date at the left margin beginning one inch from the top of the paper. Double space below the date before continuing the body of the letter.

Ms. Terra Green
Page 2
Current Date

Company Name: Key the company name a double space below the complimentary close in ALL CAPS. Quadruple space to the writer's name.

Enclosure Notation: Place an enclosure (or attachment) notation a double space below the reference initials. If multiple enclosures are referred to in the letter, follow the word "enclosures" with a colon and list each enclosure.

Copy Notation: Use a lowercase (c) by the name of the person(s) to receive a copy. Place the copy notation a double space below the last line of the enclosure notation or the reference line if there is no enclosure.

Postscript: A postscript should be keyed as the last line in the letter. It should be preceded by a double space and begin at the left margin. The initials "P.S." should not be used.

AGENDA SAMPLE

Top Margin: 2"
Side Margins: 1"
Second Page Top: 1"

FUTURE BUSINESS LEADERS OF AMERICA (DS)

Board of Directors Agenda (DS)

**Tuesday, March 20, 20—
(DS)**

1. Call to Order – Jean Buckley, Chief Executive Officer
(DS)
2. Roll Call – Mary Anvil, Secretary
3. Reading of the Minutes – Mary Anvil, Secretary
4. Treasurer's Report – Harvey Weinberg, Treasurer
5. Other Officer Reports
6. Committee Reports
 - Accounting – Mildred Wright
 - Social – Betty Einstein
 - Fund Raising – Bret Rushmore**(SS)**
7. Unfinished Business
8. New Business
9. Date of Next Meeting
10. Adjournment

Note:

Numbers may be left or right aligned.

ITINERARY SAMPLE

Top Margin: 2"
Side Margins: 1"
Second Page Top: 1"

ITINERARY
(DS)
M. J. Lawson
(DS)
October 10-13, 20—
(DS)

Sunday, October 10
(DS)

9:30 a.m. Depart Memphis Municipal Airport, United Airlines, Flight 433, nonstop, lunch served.
(DS)
 1:02 p.m. Arrive San Francisco International Airport.
(DS)
 5:30 p.m. Depart hotel for Chinatown visit.

Monday, October 11

9:00 a.m. Conference at Mark Hopkins Hotel.
 Reminder: Call Pat Martin to confirm dinner arrangements for tomorrow.

Tuesday, October 12

9:00 a.m. Conference at Mark Hopkins Hotel.
 7:00 p.m. Dinner with Pat Martin.

Wednesday, October 13

9:30 a.m. Depart hotel for airport.
 12:20 p.m. Depart San Francisco International Airport, United Airlines, Flight 700, one stop, lunch served.
 7:15 p.m. Arrive Memphis Municipal Airport.

LABEL/ENVELOPE FORMAT SAMPLE

MS JUNE R TIJERINA
 CLAIMS DEPARTMENT
 GOLDEN INSURANCE COMPANY
 1846 MARKET STREET
 SAN FRANCISCO CA 94102-1234

The Optical Character Recognition (OCR) style, including all recommended abbreviations, is to be used by the company for all labels and envelopes.

LETTER – PERSONAL

Top Margin: 2"
Side Margins: 1"

Current Date

(QS)

Ms. Terra Green
1923 Deserama Circle
Cottonwood, AZ 86326

(DS)

Dear Ms. Green

(DS)

This letter represents an acceptable format for a personal business letter. As you can see, the format is identical to a business letter keyed in block style with open punctuation. However, what makes this letter different is that the writer's address is included in the closing lines. Additionally, reference initials are not included.

(DS)

Sincerely

(QS)

Barbara Small
1912 Association Drive
Reston, VA 20191-1591

LETTER – BUSINESS

Top Margin: 2"
Side Margins: 1"

Current Date

(QS)

Ms. Terra Green
1923 Deserama Circle
Cottonwood, AZ 86326

(DS)

Dear Ms. Green

(DS)

This letter is keyed in block style with open punctuation. All lines, including the date, inside address, salutation, and closing begin at the left margin. A double space is left between all letter parts except before the inside address and the writer's name, where a quadruple space (4 returns) will be found.

This letter style is to be used for FBLA-PBL competition.

(DS)

Sincerely

(QS)

Barbara Small
Director of Education
(DS)
xx

LETTER WITH ADVANCED FEATURES

Top Margin: 2"
Side Margins: 1"

Current Date

(DS)

CONFIDENTIAL (If no mailing notation, **QS** after date.)

(DS)

Attention FBLA-PBL Competitors

FBLA-PBL, Inc.

1912 Association Drive

Reston, VA 20191-1591

(DS)

Ladies and Gentlemen

(DS)

LETTER FORMAT WITH ADVANCED FEATURES

(If no subject line, **DS** after salutation.)

(DS)

This letter illustrates the placement of all advanced letter parts as described on the enclosed sheet. It also illustrates the block style letter with open punctuation.

Please refer to this letter when keying such a document to avoid making formatting errors.

(DS)

Sincerely

(DS)

FBLA-PBL, INC.

(QS)

Barbara Small

Director of Education

(DS)

xx

(DS)

Enclosure

(DS)

c Ms. Jean Buckley, President/CEO

(DS)

Best of luck in your competition!

LETTER & MEMO – SECOND PAGE

Top Margin: 1"
Spacing of Materials: SS
Spacing after Date to Body: DS

Name of Addressee or Company

Page # **(SS)**

Date

(DS)

MEMORANDUM

Top Margin: 2"
Side Margins: 1"

TO: FBLA-PBL Competitors
(DS)
FROM: Judging Committee
(DS)
DATE: Current
(DS)
SUBJECT: Formatting a Standard Memorandum
(DS)

When formatting a standard memorandum, use a 2-inch top margin. Next, key the heading lines with a double space between each. Note that each heading is typed in ALL CAPS and informational lines are aligned on the left. The subject line should be keyed with initial caps and followed by a double space.

Paragraphs are aligned at the left margin and are single spaced with a double between each. The competitor should key his/her initials at the left margin a double space below the body of the last paragraph in lower case letters. If an attachment or enclosure is included, the word "Attachment" or "Enclosure" should be keyed at the left margin a double space below the competitor's initials.

xx
(DS)
Enclosure

NEWS RELEASE

Top Margin: 2"
Side Margins: 1"
Body: DS

NEWS RELEASE
(DS)
Contact: Patricia Wells, FBLA Adviser
Washington High School
1801 E. National Avenue
Phoenix, AZ 85007-0032
602-555-1234

(DS)
Release May 1, 20—

(QS)

STUDENTS EARN TRIP TO FBLA NATIONAL CONFERENCE

(QS)

Fifteen Washington High School Future Business Leaders of America members have been selected to represent Arizona at the FBLA National Leadership Conference.

These students have the opportunity to attend this conference with over 5,000 other high school delegates representing each state, the Virgin Islands, Guam, Canada, and the Department of Defense Dependent Schools.

To raise funds to attend this conference, FBLA members will hold a yard sale and silent auction May 23 and May 24 from 8 a.m. to 2 p.m. at Washington High School.

Any community members wishing to make a donation for the yard sale/silent auction may contact Patricia Wells at the above number.

(DS)
###

MINUTES

Top Margin: 2"
Side Margins: 1"

**WASHINGTON HIGH SCHOOL FBLA
(DS)
Minutes of September 1, 20—**

(QS)

**Call to Order
(DS)**

The regular meeting of the Washington High School FBLA chapter was called to order on Monday, September 1, 20— at 3:30 p.m. President Steve Dockray called the meeting to order with Secretary Dale Williams recording minutes.

Attendance

All members were in attendance.

Minutes

The minutes of the August 1, 20— meeting were read. Justin Vaughn moved to approve the minutes as read. They were seconded and approved.

Treasurer's Report

Treasurer Kelly Osborne reported a chapter balance as of September 1, 20— of \$347.16. The report was filed.

Unfinished Business

The date for the Winter Dance was announced. It will be held November 27 in the main gym. The price per person will be \$5 each or \$8 per couple.

New Business

None.

Announcements

Reminder for all members to begin collecting pledges for the March of Dimes Walk-A-Thon.

Adjournment

There being no further business, the meeting was adjourned at 4:10 p.m.

(QS)

Terra Green, Secretary

OUTLINE

Top Margin: 2"
Side Margins: 1"
Spacing in Body: SS

FORMATTING OUTLINES

(QS)

I. VERTICAL SPACING

(DS)

- A. Title of Outline
 - 1. Two-inch top margin
 - 2. Followed by a quadruple space
- B. Major Headings
 - 1. First major heading preceded by a quadruple space; all others preceded by a double space
 - 2. All major headings followed by a double space
 - 3. All subheadings single-spaced

(DS)

II. HORIZONTAL SPACING

(DS)

- A. Title of Outline Centered over Line of Writing
- B. Major Headings and Subheadings
 - 1. Identifying lower case roman numerals aligned at left margin or aligned on periods
 - 2. Identifying letters and numbers for each subsequent level of subheading aligned below the first word of the preceding heading

(DS)

III. CAPITALIZATION

(DS)

- A. Title of Outline Keyed in ALL CAPS
- B. Major Headings Keyed in ALL CAPS
- C. First-order Subheadings Keyed with all Major Words Beginning with Initial Caps
- D. Second-order Subheadings Keyed with First Word Only Using Initial Cap

Note:

Roman numerals can be left or right aligned.

REPORT

| | |
|-------------------------|-----------|
| Top Margin: | 2" |
| Side Margins: | 1" |
| Spacing in Body: | DS |

REPORT FORMATTING

(QS)

Standard Margins

With the exception of the left margin, all margin settings are the same for the unbound and leftbound reports. The right margin is one inch. A top margin of two inches and a bottom margin of one inch are used on the first page of reports. All remaining pages are keyed with one-inch top and bottom margins. Since the internal spacing of report parts varies, a bottom margin of exactly one-inch is sometimes not feasible. The bottom margin may be varied to prevent a side heading or first line of a paragraph from printing as the last line on a page (orphan), or the last line of a paragraph from occurring at the top of a new page (widow.)

Page Numbering

The first page of a report is not numbered. On the second and subsequent pages, place the page number in the upper right side of the page header. Reference pages should also be numbered.

Long Quotes

Quoted material of four or more lines should be single spaced, indented 0.5 inch from both the left and right margins, and doubled space above and below the quoted materials.

Enumerated or Bulleted Items

Indent enumerated or bulleted items 0.5 inch from the left margin; block the lines at the beginning of the first word of the item. The right margin for enumerated and bulleted items remains at one inch. Single space individual items; double space between items as well as above and below a series of items.

Headings and Subheadings

Main heading. Center the main heading in ALL CAPS and bold over the body.

Side headings. Begin side headings at the left margin. Capitalize the first letter of the first word and all other main words in each heading. Bold side headings.

Paragraph headings. Indent paragraph headings 0.5 inches from the left margin. Capitalize the first letter of the first word only. Underline the heading and follow it with a period.¹

REPORT – continued

Top Margin: 1"
Side Margins: 1"
Spacing in Body: DS

2

Endnotes

Endnotes are placed at the end of the report, and the endnote is cited by a superscript number. The endnotes page has the same top and side margins as the first page of the report and is numbered. Each endnote is single spaced with a double space between endnotes. The first line of each endnote is indented 0.5" from the left margin; all other lines begin at the left margin.²

References

All references cited will be listed alphabetically under the heading REFERENCES or BIBLIOGRAPHY or WORKS CITED. The page has the same top and side margins as the first page of the report and is numbered. Each reference is single spaced with a double space between references. The first line of each reference begins at the left margin; all other lines are indented 0.5 inch from the left margin.³

When listing the titles of individual works, follow these guidelines: Titles of books should be italicized. Titles of articles should be placed in quotation marks. Journal or magazine titles should be italicized. The title or description of materials found on Web sites or other Internet sources should be surrounded by quotation marks.

Note:

Put just the page number on the second and subsequent pages in the upper right side of the page header 0.5 inch from top of page.

ENDNOTE PAGE

Top Margin: 2"
Side Margins: 1"
Spacing in Body: SS

ENDNOTES

(QS)

¹D. F. Dansereau, "Learning Strategy Research," *Thinking and Learning Skills*, Vol. 1, Hillsdale, NJ: Lawrence Erlbaum, 1999, p. 111.

(DS)

²Rose Huber, "Teaching Students How to Study," *Eastside Weekend*, September 1-7, 1998, p. 18.

(DS)

³Theodore Silver, *Study Smart*, New York: Villard Books, 2000, p. 99.

REFERENCE PAGE

Top Margin: 2"
Side Margins: 1"
Spacing in Body: SS

REFERENCES

(QS)

Dansereau, D. F. "Learning Strategy Research," *Thinking and Learning Skills*. Vol. 1. Hillsdale, NJ: Lawrence Erlbaum, 1999.

(DS)

Huber, Rose. "Teaching Students How to Study," *Eastside Weekend*. September 1-7, 1998.

Silver, Theodore. *Study Smart*. New York: Villard Books, 2000.

The Shakespearean Homework Helper <liadona2@aol.com>. "Where is Duke Orsin's Palace?" 29 November 1999. Borrow, Christine <student5@your school.com>.

U.S. Census Bureau. "American FactFinder: Facts About My Community." [Online] 30 November 1999. <http://factfinder.census.gov/java_prod/dads.ui.homePage.HomePage>.

USGS. "Map: Major Volcanoes in Ecuador." [Online image] 30 November 1999. <http://vulcan.wr.usgs.gov/Volcanoes/Ecuador/Maps/map_ecuador_volcanoes.html>.

Zoological Society of San Diego. "Let's See Those New Teeth," San Diego Zoo Baby Panda Exhibit. [Online video clip] 29 November 1999. <http://sandiegozoo.org/special/pandas/pandas_baby_videos3.html>.

Special Instructions

- Column headings may be centered over column or blocked at left of column.
- Tables using both one- and two-line column headings should be aligned at the bottom of the cell.
- For two-line column headings in tables without gridlines, underline the bottom word of the heading.
- Gridlines are optional unless otherwise stated.
- If gridlines are not used, underline column headings and DS after heading.
- Do not include \$ with dollar amounts in columns. Dollar signs may be placed in Total Row.
- All columns containing numbers should be right or decimal aligned.
- All columns containing text should be left aligned.
- The body of the table may be single or double spaced.
- Tables within another document should be centered horizontally unless otherwise indicated.
- DS before and after the table.
- Gridlines should not be used in titles.

TABLES

Center Vertically
Center Horizontally

Example Table with Gridlines

SALARY CHART TABLES
(DS)
Administrative Support Department
(QS)

| Position | Current Salary | Percent Increase | Amount Increase | New Salary |
|--------------------------|-----------------------|-------------------------|------------------------|-------------------|
| Accountant | 26,000.00 | 6.5 | 1,690.00 | 27,290.00 |
| Administrative Assistant | 23,000.00 | 5.5 | 1,265.00 | 24,265.00 |
| Data Entry Clerk | 16,500.00 | 4.5 | 742.50 | 17,242.50 |
| Executive Assistant | 25,000.00 | 6.5 | 1,625.00 | 26,625.00 |
| Office Specialist | 19,000.00 | 5.0 | 950.00 | 19,950.00 |
| Total | \$109,500.00 | | \$6,272.50 | \$115,372.50 |

Example Table without Gridlines

SALARY CHART
(DS)
Administrative Support Department
(QS)

| <u>Position</u> | <u>Current Salary</u> | <u>Percent Increase</u> | <u>Amount Increase</u> | <u>New Salary</u> |
|--------------------------|------------------------------|--------------------------------|-------------------------------|--------------------------|
| Accountant | 26,000.00 | 6.5 | 1,690.00 | 27,290.00 |
| Administrative Assistant | 23,000.00 | 5.5 | 1,265.00 | 24,265.00 |
| Data Entry Clerk | 16,500.00 | 4.5 | 742.50 | 17,242.50 |
| Executive Assistant | 25,000.00 | 6.5 | 1,625.00 | 26,625.00 |
| Office Specialist | <u>19,000.00</u> | 5.0 | <u>950.00</u> | <u>19,950.00</u> |
| Total | \$109,500.00 | | \$6,272.50 | \$115,372.50 |

TABLE OF CONTENTS

Top Margin: 2"
Side Margins: 1"

TABLE OF CONTENTS

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Note:

Page numbers should be right aligned with leader lines.